

Attachment A: TAF Work Incentive Payment Examples

		Scenarios	Field Actions	Clearinghouse Actions
1)	Employed, increased earnings	<p>Lindsey has been receiving TAF benefits for 42 months. She has an open MACM case at the Clearinghouse.</p> <p>She has been employed and receiving the 60% disregard since July, 08. She reports and verifies in December she has received an increase in her wages. The case manager completes a new budget, and discovers her income exceeds the TAF budgetary standards. Since Lindsey has earnings, she is eligible for the Work Incentive payment of \$50. * The case manager notes there is no Child Support income on the UNIN screen.</p> <p>Follow up: Lindsey continues employment through the five months, the system authorizes the following four months of eligibility. An alert will notify the case manager the end of the Work Incentive payment, as which time, the case manager will close the TAF case with no further closure notice needed. Work Program transitional services begin the month following the Work Incentive payment closes. No further notice to the Clearinghouse is required.</p>	<p><b>AFPD, Work Incentive Field:</b> enter \$50 and press enter. Notice: A721</p> <p><b>Medical:</b> Complete the TAF Change Form with earnings listed. Check the TAF Work Incentive box and e-mail to: <a href="mailto:HW-Info@khpas.gov">HW-Info@khpas.gov</a></p> <p><b>Follow up:</b> At the end of the 5<sup>th</sup> month of Work Incentive payment, case manager needs to close the TAF case. No TAF closure notice needed, however, need to notify of transitional support service eligibility: A420 or W407.</p> <p><b>Food Assistance:</b> The case manager may need to send a Food Assistance change notice. Case remains categorically eligible for Food Assistance during the Work Incentive payment months, and the transitional work program support months. Use of form ES 1510.1 may be necessary.</p>	<p>Upon receipt of the TAF Change Form, review the case for potential MA WT eligibility.</p> <p>If MACM has been received in three of the last six months, and Lindsey was a MACM recipient at the time of the increase in wages, approve MAWT coverage.</p>
		<p>*Once income is verified, the case manager does not need to re-verify if the case is pulled for a sample (if dated within six months). Once income is verified, the case manager does not need to re-verify employment to assess continued eligibility for the \$50 Work Incentive payment. Reporting requirements continue as per KEESM 9000 and case changes are to occur as per TAF program requirements.</p>		

		Scenarios	Field Actions	Clearinghouse Actions
2)	Application, eligible first month, earnings exceed the second month	<p>Jackson applied for TAF on February 19<sup>th</sup>. He has an open MP case at the Clearinghouse.</p> <p>He was laid off from his employment, and received his last check on the 4<sup>th</sup> of the month. Using actual income for February, Jackson is eligible for a \$20 TAF grant, however, due to proration, he will not receive this payment. He has obtained new employment, and will begin on February 25<sup>th</sup>, and will receive 2 pay checks in March. This March income will exceed the TAF budgetary standards. Because Jackson was eligible for February, and his earnings for March exceed the budgetary standards, he is eligible for the \$50 Work Incentive payment. The case manager notes UNIN shows Child Support Income (CS EX), however, this income is under \$50, so the customer's TAF benefit will be higher than the assigned child support income.*</p> <p>Follow up: Jackson continues to receive the \$50 payment through the five months, the system authorizes the following four months of eligibility. An alert will notify the case manager of the end of the Work Incentive payment, at which time, the case manager will close the TAF case with no further closure notice needed. Work program transitional services start the month following the Work Incentive payment closure.</p> <p>No further notice to the Clearinghouse is required</p>	<p><b>Medical:</b> Complete the TAF Change Form, marking the TAF Application box. Attach the TAF application and mail to the Clearinghouse within 5 business days.</p> <p><b>AFPD, Work Incentive Field:</b> enter \$50 and press enter. Send TAF approval notice for one month A101; send change notice A721 for the second month. The case manager will set the review for 12 months.</p> <p><b>Medical:</b> Complete the TAF Change Form with all income listed. Mark the TAF Work Incentive box and email to the CH.</p> <p><b>Follow up:</b> At the end of the 5<sup>th</sup> month of Work Incentive payment, case manager needs to close the TAF case. No TAF closure notice needed, however, may need to notify of transitional support service eligibility: A420 or W407.</p> <p><b>Food Assistance:</b> May need Food Assistance change notice. Case remains categorically eligible for Food Assistance during the Work Incentive payment months, and the transitional work program support months. Use of form ES 1510.1 may be necessary.</p>	<p>Determine eligibility for MACM based on the TAF application. Request additional verification if necessary.</p> <p>Determine eligibility for MAWT based on the increase in wages.</p> <p>If MACM has been received in three of the last six months, and Jackson was approved for MACM in February, approve MAWT coverage.</p>
		*When a case becomes eligible for the Work Incentive payment of \$50, the case manager needs to determine if the child support retained by the state exceeds \$50. If so, do not proceed with the Work Incentive payment, as the child support income will exceed the TAF grant.		

		Scenarios	Field Actions	Clearinghouse Actions
3)	TAF over 60 months	<p>Joyce has been on TAF assistance for 57 months. There is not an open medical case at the Clearinghouse. There is no potential for TransMed as they've not received MACM in three of the last six months. Joyce is employed part time when she calls to report she is now working more hours. Her new income exceeds the TAF budgetary standards. The case is eligible for the \$50 Work Incentive payment.</p> <p>Follow up: At the 60<sup>th</sup> month, Joyce is still employed. She does not meet any hardship criteria. TAF will continue as long as Joyce is eligible for the Work Incentive payment. At the conclusion of the five months, Joyce will have received 62 months of TAF assistance. A closure notice is to be sent. She will not be eligible for work program transitional support services. No further notice to the Clearinghouse is required</p>	<p><b>AFPD, Work Incentive Field:</b> enter \$50 and press enter. Send notice A721 Medical: Determine medical eligibility, as no open medical exists at the Clearinghouse.</p> <p><b>Follow up:</b> A430/A431 closure* notice needs to be sent at the end of the five months of the Work Incentive payment.</p> <p><b>Food Assistance:</b> Categorical eligibility ends with the closure of the TAF case, since eligibility ends for work transitional support services also.</p>	No open medical case at the Clearinghouse. No action needed.
		*Best Practice: Send a closure notice at the end of the five months of Work Incentive payment eligibility. If notice A721 or A121 has not been sent at the implementation of the Work Incentive payment, then a closure notice must be sent.		

		Scenarios	Field Actions	Clearinghouse Actions
4)	Income Termination, Eligibility for TAF	<p>Colin is receiving TAF assistance. He has an open MACM case at the Clearinghouse. He has been on assistance for 33 months. On March 10<sup>th</sup>, Colin reports and verifies temporary employment. He will be employed for 3 months, at which time his employment will end. His prospective income exceeds the TAF budgetary standards. The case is eligible for the \$50 Work Incentive payment. He is told to report when the employment ends as per change reporting requirements. Colin remains categorically eligible for Food Assistance, and an ES-1510.1 may need to be completed.</p> <p>On May 24<sup>th</sup>, Colin reports and verifies he will receive his last check from employment on May 31<sup>st</sup>.</p>	<p><b>AFPD, Work Incentive Field:</b> enter \$50 and press enter. Send notice A721 <b>Medical:</b> Complete the TAF Change Form with earnings listed. Check the TAF Work Incentive box and e-mail to HW-Info@khpa.ks.gov</p> <p><b>Follow up:</b> Employment ends, TAF benefit resumes. Income is removed from the budget and a change notice is sent to Colin to notify him of changes in his TAF and FA benefits for June. <b>Medical:</b> Complete the TAF Change Form with the Change in Income and No Income Reported boxes checked. Email to HW-Info@khpa.ks.gov</p>	<p>Upon receipt of the TAF Change Form, review the case for potential MA WT eligibility. Since MACM has been received in three of the last six months, and Colin was a MACM recipient at the time of the increase in earnings, approve MAWT coverage.</p> <p>Due to the loss of employment, approve MACM coverage. Set the review for a new 12 month period.</p>

		Scenarios	Field Actions	Clearinghouse Actions
5)	2 Parent, combination of Earned and Unearned Income Change in circumstances	<p>Stacy and Brian and their three children have been on TAF assistance for thirteen months. They have an open MACM case at the Clearinghouse. Stacy is receiving \$75 a week in unemployment benefits. Brian reports and verifies he is going back to work part-time. His part-time earnings and Stacy's unemployment benefits exceed the budgetary standards for TAF benefits. Because there are earnings involved, this case is eligible for the \$50 Work Incentive payment.</p> <p>Follow up: Stacy and Brian have received 4 months of the Work Incentive payment. Stacy's unemployment benefits have ended, however, she has now found employment, and the combined income of Stacy and Brian remain above the TAF budgetary standard. Since the case has received 4 out of the 5 consecutive months of the TAF Work Incentive payment, the case has one month remaining before the case manager closes the case. The \$50 work incentive is per case, not per individual. No additional TAF closure notice needs to be mailed.</p> <p>Work program transitional services begin the month following Work Incentive payment closure.</p>	<p><b>AFPD, Work Incentive Field:</b> enter \$50 and press enter. Send notice A721</p> <p><b>Medical:</b> Complete the TAF Change Form with all income listed. Check the TAF Work Incentive box and e-mail to HW-Info@khp.ks.gov</p> <p><b>Food Assistance:</b> May need Food Assistance change notice. Case remains categorically eligible for Food Assistance during the Work Incentive payment months, and the transitional work program support months. Use of form ES 1510.1 may be necessary. Notify of transitional support service eligibility: A420 or W407.</p> <p><b>Medical:</b> Complete the TAF Change Form with all income listed. Check the Change in Income box. Email to HW-Info@khp.ks.gov</p>	<p>Upon receipt of the TAF Change Form, review the case for potential MA WT eligibility. If MACM has been received in three of the last six months, and since Brian was a MACM recipient at the time of the increase in earnings, approve MAWT coverage.</p> <p>Since the family is currently receiving MAWT, the increase in income will not affect coverage. No action is required until the 6-month MAWT review is received.</p>

		Scenarios	Field Actions	Clearinghouse Actions
6)	Review due during the 5 month eligibility for the Work Incentive payment	<p>April has been on TAF assistance for 10 months. She has an open MACM case at the Clearinghouse. Her son receives Social Security Survivors benefits of \$173 monthly. April obtained full time employment and received a \$5000 sign on bonus which she promptly put in savings. Her earnings and her son's survivor benefits exceed the TAF budgetary standards. She is eligible for the TAF Work Incentive payment.</p> <p>Follow up: At the end of the 11<sup>th</sup> month of benefits and after only one month of the Work Incentive Payment, April is sent a review form. She fails to return this review, and her TAF case is closed by the system. No further action is required by the case manager.</p>	<p><b>AFPD, Work Incentive Field:</b> enter \$50 and press enter. Send notice A721 LIRE: code XA</p> <p><b>Medical:</b> Complete the TAF Change Form with all income listed. Check the Change in Income and TAF Work Incentive boxes. E-mail the form to HW-Info@khp.ks.gov</p> <p><b>Follow up:</b> Transitional Work program services remain available for April for twelve months. During this time, April remains categorically eligible for Food Assistance (if the FA was not also closed due to failure to return the review)</p>	<p>Upon receipt of the TAF Change Form, review the case for potential MA WT eligibility. If MACM has been received in three of the last six months, approve MAWT coverage.</p>

		Scenarios	Field Actions	Clearinghouse Actions
7)	First month eligibility, no payment On/Off Work Incentive Payment	<p>Julie applies for TAF benefits on February 1. She has an open MP case at the Clearinghouse. She is employed part-time and needs a little extra assistance to pay the bills. Prior to any action being taken on the application, Julie notifies the case manager she has been given a raise.</p> <p>Julie is eligible for TAF in the amount of \$8 for February. (Since this is under \$10, it is not issued.) However, when the case manager budgets the new amount of income for March, Julie is over income. Julie needs child care and wants the TAF case left open, as she does not have money to budget for the family share.</p> <p>Because Julie was eligible for TAF in the month of February, she is eligible for the \$50 Work Incentive payment effective in March for five months.</p> <p>Two months later, Julie reports she was laid off from her employment. She is not eligible for unemployment benefits. Julie is eligible for a full TAF benefit.</p> <p>After receiving a month of TAF benefits, Julie reports and verifies she found another job. This income exceeds the TAF budgetary standards, and Julie is once again eligible for the Work Incentive payment for five months. Her JO child care remains open for the five months of Work Incentive, then change to EM child care and remove the family share for two months following TAF closure. (this can happen an unlimited number of times)</p>	<p><b>Medical:</b> Complete the TAF Change Form, marking the TAF Application box. Attach the TAF application and mail to the Clearinghouse within 5 business days. Send TAF approval notice A101</p> <p><b>Food Assistance:</b> Customer is categorically eligible for Food Assistance. AFPD, Work Incentive Field: enter \$50 and press enter. Send notice A721</p> <p><b>Medical:</b> Complete the TAF Change Form with all income listed. Check the Change in Income and TAF Work Incentive boxes.</p> <p><b>Medical:</b> Complete the TAF Change Form. Check the Income Change and No Income Reported boxes. TAF: Send change notice</p> <p><b>Medical:</b> Complete the TAF Change Form with all income listed. Check the Change in Income and Work Incentive boxes.</p>	<p>Determine eligibility for MACM based on the TAF application. Request additional verification if necessary.</p> <p>Determine eligibility for MAWT based on the increase in wages. If MACM has been received in three of the last six months, and Julie was approved for MACM in February, approve MAWT coverage.</p> <p>Determine eligibility for MACM based on zero income. Establish a new 12-month eligibility period.</p> <p>Determine eligibility for MAWT based on the increase in wages. If MACM has been received in three of the last six months, approve MAWT coverage.</p>

		Scenarios	Field Actions	Clearinghouse Actions
8)	Earned and Unearned Income	<p>Tom, Mary and their children have been on TAF assistance for 26 months. They have an open MACM case at the Clearinghouse. Tom works 20 hours a week. In July, Mary's daughter moves in. She receives Social Security Survivors benefits in the amount of \$700. This income, in addition to Tom's earnings, exceed the TAF budgetary standard. However, since earned income is involved, this family is eligible for the \$50 Work Incentive payment for five months.</p> <p>A worker alert will notify the case manager when the five months of the Work Incentive ends, and the case manager will close the TAF case. No TAF closure notice is needed. Transitional Work program service eligibility is for twelve months.</p>	<p><b>AFPD, Work Incentive Field:</b> enter \$50 and press enter. Send notice A721</p> <p><b>Medical:</b> Complete the TAF Change Form with income listed. Check the Change in Income and Work Incentive boxes.</p> <p><b>Food Assistance:</b> Customer is categorically eligible for Food Assistance throughout the Work Incentive payment months, and the twelve months of transitional work program services. Notify of transitional support service eligibility: A420 or W407.</p>	<p>Determine eligibility for MAWT based on the Income Change reported.</p> <p>Because the increase in income is from Social Security and not wages, the family is ineligible for MAWT.</p> <p>Close MACM coverage providing timely notice and open the children on MP. Do not establish a new review period.</p>

		Scenarios	Field Actions	Clearinghouse Actions
9)	Overpayment	<p>Lola has been receiving TAF assistance for 36 months with no income. She has an open MACM case at the Clearinghouse. At her review the case manager notices income reported on BASI. When verified, the case manager notes she has not been eligible for TAF for the last 5 months. Since Lola's earned income exceeds the TAF budgetary standards, she is eligible for five months of the \$50 Work Incentive payment beginning the following month.</p> <p>The case manager will compute the overpayment for the appropriate months, and begin collection as laid out in KEESM.</p> <p>A worker alert will notify the case manager when the five months of the Work Incentive ends and the case manager will close the TAF case. No TAF closure notice is needed. Work program transitional services begin the month following Work Incentive payment closure.</p>	<p><b>AFPD, Work Incentive Field:</b> enter \$50 and press enter. Send the review notice A121</p> <p><b>Medical:</b> Complete the TAF Change Form with income listed. Check the Change in Income and TAF Work Incentive boxes. In the e-mail to the CH, include a note that the prior five months are ineligible TAF months. If available, include the date employment started on the TAF Change Form. If overpayment not yet calculated, attach any available wage verification for overpaid months.</p> <p>Send an overpayment notice and begin collection as appropriate</p> <p><b>Food Assistance:</b> Customer is categorically eligible for Food Assistance throughout the Work Incentive payment months, and the twelve months of transitional work program services. Notify of transitional support service eligibility: A420 or W407.</p>	<p>Determine eligibility for MAWT based on the Income Change reported.</p> <p>Request income verification as needed from the consumer to determine accurate eligibility for MACM for the prior months already determined to be ineligible for TAF.</p> <p>Determine MAWT eligibility to begin based on when the income change actually occurred.</p> <p>If necessary, initiate the 6-month MAWT review.</p>

		Scenarios	Field Actions	Clearinghouse Actions
10)	Loss of employment/ untimely verification	<p>Cameron has been receiving the Work Incentive payment for two months when he calls on May 13<sup>th</sup> to report he lost his job. He has an open MP case at the Clearinghouse and recently contacted the Clearinghouse to request coverage.</p> <p>An employment letter is mailed, requesting its' return by May 24<sup>th</sup>. Cameron does not return this letter, and it is too late to send a closure notice for failure to provide. Cameron receives the \$50 Work Incentive payment for June. On June 2<sup>nd</sup>, Cameron returns the employer letter and wants his full TAF benefit for June. Since Cameron did not provide verification timely, the first month benefits can be changed is the month following the month verification is received, in this situation, July.</p>	<p><b>AFPD, Work Incentive Field:</b> remove the \$50</p> <p><b>Medical:</b> Complete the TAF Change Form with the Change in Income box checked.</p> <p><b>Follow up:</b> Cameron needs to placed into an appropriate work component</p>	<p>Determine eligibility for MACM. If ineligible for MACM, determine the impact of the income change on the MP program.</p>
11)	Loss of employment, No good cause	<p>Melissa has been receiving the Work Incentive payment for two months when she calls on May 20<sup>th</sup> to report she was laid off. She has an open MAWT case at the Clearinghouse.</p> <p>An employment letter is mailed, requesting its' return by May 31st. The employment letter verifies Melissa was fired for failing to show for work. Melissa will need to cure a work program penalty prior to being eligible for TAF and for Food Assistance for herself.</p>	<p><b>Medical:</b> Complete the TAF Change Form with the Change in Income box checked.</p> <p><b>Follow up:</b> TAF closure, code Melissa DI on Food Assistance until job penalty cured. REMINDER: The \$50 is still counted as income for July as be KEESM 2552. Remove the \$50 for August.</p>	<p>Determine eligibility for MACM based on job loss. Establish a new 12 month eligibility period.</p>

		Scenarios	Field Actions	Clearinghouse Actions
12)	Change in household members	<p>Stephanie and George have received three months of the Work Incentive payment when Stephanie calls to report she has given birth to a child. They have an open MP case at the Clearinghouse.</p> <p>When adding the child to the case, Stephanie and George are now eligible for a TAF benefit of \$22. Even though the benefit is lower than the \$50 Work Incentive payment, their income no longer exceeds the TAF budgetary standards.</p>	<p><b>Medical:</b> Complete the TAF Change Form with income listed. Check the Household Change box.</p> <p><b>Follow up:</b> Send a change notice informing of changes to TAF and FA benefits. Work Programs may need to be re-initiated at this time.</p>	<p>Determine eligibility for MACM. Since MACM has not been received in the last four months, the household does not qualify for the 40% disregard. Add the newborn to the open medical case.</p>
13)	Loss of employment, Not reported	<p>Patricia has been receiving the Work Incentive payment for the last five months. She has an open MAWT case at the Clearinghouse. Her TAF case closed at the end of last month. Patricia calls and requests her TAF be reopened. She reports she lost her job in the first month of the Work Incentive payment. She has had no earnings since that time.</p> <p>If Patricia had reported a loss of employment, she may have been eligible for an increase in her TAF benefit. There is no overpayment in this situation. (A new application is not needed as Patricia's TAF case has been closed for less than 30 days)</p>	<p>No overpayment occurred, no action necessary.</p> <p><b>Medical:</b> Complete the TAF Change Form. Check the Change in Income box.</p>	<p>Determine eligibility for MACM based on the job loss. If all family members have already received MAWT, eligibility for MACM should not be re-determined for months in which coverage was correctly provided another coverage category.</p>